

ACS/City of Memphis

Implementation of an Enterprise Project Management (EPM) Solution

Request for Proposal

Prepared By: Information Services

Closing Date for Proposals: 04/26/05

Proposals Accepted at: ATTN: ACS Purchasing

Implementation of an EPM Solution

100 North Main Street

Suite 3225

Memphis, TN 38103

Creation Date: 02/23/04

RFP Version: 1.2

E-Mail Inquiries: requests@memphistn.gov

**AFFILIATED COMPUTER SERVICES (ACS), INC.
CITY OF MEMPHIS INFORMATION SERVICES**

**Request for Proposal
Implementation of an EPM solution**

ACS and the City of Memphis (hereinafter referred to as "City") invites qualified Vendors to provide Proposals for the implementation of an Enterprise Project Management (EPM) solution for the Information Services Department of the City of Memphis.

The selected Vendor will be contractually responsible for all services denoted in the document. ACS will be accountable for the management of this contract.

Any prospective Vendor failing to meet any milestones of the RFP without prior notification to and consent from ACS will constitute cause for disqualification from this RFP.

All questions pertaining to the RFP must be forwarded to ACS at the e-mail address listed on the front page of the document under "**E-Mail Inquires.**"

Interested parties should carefully review this RFP, including all requirements, terms, conditions, performance standards, and financial penalties to ensure the most responsive proposals.

1. Introduction

The Information Services Department of the City of Memphis provides services to satisfy the information processing requirements of all divisions in city government and helps these divisions in the effective use of information and telecommunication technologies to better serve the citizens of Memphis.

Presently, the Information Services Department receives requests from other divisions within City of Memphis government to initiate and manage projects or to purchase equipment and software to support the functions of those divisions. The existing processes for enabling these requests are manual and paper-driven. There is also lack of visibility into really how the resources are allocated and utilized.

The Information Services Department is seeking an implementation partner to assist in deploying an enterprise project management (EPM) solution using MS Sharepoint and MS Project Server. This EPM solution will process technology requests from the divisions and manage the requests through procurement and project execution. The EPM solution will also improve communication, standardize on a common project management platform, and enforce standard processes. The selected implementation partner will facilitate requirements gathering, deliver a deployment schedule and architecture diagram, install and configure the EPM solution, and provide appropriate documentation, training and support to Information Services employees and contractors. Components of the EPM useful to Information Services include:

- Electronic approvals
- Document versioning control
- Log of events
- Assigning items
- Email notification of status changes
- Role-based dashboards
- Real-time status of requests

1.1 Schedule of Activities

| Activity | Date |
|--|---------|
| Distribution of RFP | 4/6/05 |
| Deadline for questions | 4/20/05 |
| Proposal Due (Mandatory) | 4/26/05 |
| Sealed Proposals Opened by RFP Committee | 4/27/05 |
| Oral Presentation by Vendors (optional at City discretion) | TBD |

2. Contract Scope

2.1 Enabling Technology Requests in the EPM

Below is a brief overview of how the EPM system would enable the department of information technology to improve the flow of procurement and project management. This document does not contain all requirements, but is to be used as a building block for these processes.

Requests will come from several different City divisions through the change management specialist (CMS) when there is a request for a project or new equipment.

1. *If the request is a project, it will need to go through the “project process.”*
2. *If the request is for new equipment, it will need to go through the “procurement process”.*

2.1.1 High Level Project Process

- CMS records request as a project
- Deputy CIO and CIO approve project
- Account Executive approves project
- Project Manager is assigned
- Project Manager creates project documentation, including
 - Project description
 - Budget, in the form of a Total Cost of Ownership (TCO) over 5 years (Exhibit B)
 - Project schedule (MS Project)
 - Major milestones against which project success will be tracked
- Applications Manager approves project documentation
- Account Executive approves project documentation
- CMS approves project documentation
- City Procurement approves documentation
- The following members of the project team will need to sign-off on every milestone as it is completed
 - Department Representative
 - Project Manager
 - Application Manager
 - CMS
 - Account Executive
 - City Procurement Manager
 - Deputy CIO
 - CIO
- Issues are logged and resolutions are tracked
- Project Manager submits change requests and they are approved by:
 - Department Representative
 - Project Manager
 - Application Manager
 - CMS
 - Account Executive
 - City Procurement Manager
 - Deputy CIO
 - CIO
- Project team approves project close-out documentation
 - Department Representative
 - Project Manager
 - Application Manager
 - CMS
 - Account Executive
 - City Procurement Manager
 - Deputy CIO
 - CIO

2.1.2 High Level Procurement Process

- CMS records request as a procurement for new hardware or software
- Prepare a Total Cost of Ownership (TCO) over 5 years
- Quotes and/or vendor pricing lists are referenced to satisfy request

- City IS department approves TCO to encumber funds in the overall City Budget
- Purchase order is forwarded to vendors
- Receipt of inventory is noted and operations is informed
- Resources to deploy inventory are assigned
- Invoice is received
- EPM does four-way inventory reconciliation:
 - Vendor Quote
 - City Purchase Order
 - Inventory Confirmation
 - Vendor Invoice

2.2 Project Scope

Vendor will provide a detailed project plan outlining the implementation of the EPM solution. All tasks will need an owner (exp. Information Services Project team or Vendor) and a timeline.

2.2.1 In-Scope Tasks

The tasks necessary to deliver the EPM solution include:

- Role-based requirements documentation
- Project Charter, including:
 - Summary of current state, objectives, risks, action items, benefits, and business rules
 - Updated scope, deployment schedule, and costs
 - Recommendations for administrative settings, security model, enterprise fields, codes, report views, global settings, resource pool, project templates, and training
 - Documentation of recommendations implemented
- Installation of MS Project Server, MS Sharepoint and related components
- Configuration of enterprise environment per Project Charter recommendations
- Configuration of form for technology requests from divisions
- Configuration of templates to meet collaboration needs of the project teams
- Configuration of templates to meet purchasing processing requirements for the procurement team
- Onsite training:
 - Administrator training course to implement configuration decisions/settings, emphasizing knowledge transfer
 - Project manager training course to review project management processes, workflows, best practices and custom EPM solution
 - Procurement training course to review purchasing processes, workflows, best practices and custom EPM solution
 - Technical training for developers about development in Sharepoint using webparts
- Standard courseware manuals to administrators and project managers
- Custom quick reference cards for project managers and team members
- Deployment support
- Documentation of installation, configuration, customizations and solution architecture
- Time tracking and reporting

2.2.2 Out-of-Scope Tasks

The following tasks are out of scope for this project.

- Purchasing/acquiring necessary hardware, software, and licenses
- Integrating with existing systems

- Developing project methodologies or business processes
- Developing a procurement/purchasing methodology
- Training on project management fundamentals, theory, and methodology
- Training on purchasing or accounting best practices

2.3 Long Term Support Costs

Vendor will be responsible for training ACS resources to support the implementation with additional development as needed.

As a back-up to the ACS resources, we are requesting you provide two different costs that will be good for the next three years.

- 1) Off site programming, customization and support
- 2) On site programming, customization, and training

2.4 Service Site

All products related to this RFP will be implemented at the City of Memphis's Network Operations Center in City Hall.

2.5 Current and Planned Setup

The system setup will be for a user base of 100 users, but the system will need to be designed to handle 200 users within the next few months. We will need to have the option of up to 30 unique dashboards.

2.6 Service Levels

ACS and the City expect Vendors to meet the service levels described below. By not meeting the service levels, the Vendor has not complied with the service required by this contract.

- a) All milestones established in the Project Plan need to be met on time and any delay will be penalized at \$200.00 per calendar day until the milestone is met.
- b) Any change to milestones should be submitted at least three (3) weeks before the milestone date with detailed justification.
- c) Vendor shall report all such failures on a monthly basis and for each failure the Vendor shall demonstrate that either the failure was due to an excusing event (e.g. a Force Majeure event) or the Vendor must set forth a corrective action plan to insure that the failure will be cured prior to the next monthly report.
- d) The training requested would be provided onsite by well qualified trainers to the proper satisfaction of the participants.

3.0 Vendor Qualification

3.1 Business Operation

Vendor must have experience in providing similar support and services for a minimum of five (5) years.

3.2 Business Compliance

Vendor must also be in compliance with all City of Memphis, Shelby County, and Tennessee business licensing, bond and insurance requirements.

3.3 Indemnification and Insurance – All listed insurance is required and must be agreed to in the reply of this document.

1. Indemnification: Vendor shall indemnify, defend, and save harmless ACS, their respective agents, officers, and employees from and against any and all claims, suits, actions, including workers' compensation suits, and costs of any kind, including all defense costs, all attorney's fees, arising as a result of death, personal injury, or damage to real or personal property caused, in whole or in part, by the acts or omissions of Vendor in connection with this Agreement.
2. Insurance: Vendor shall provide and maintain at its own expense during the term of this Agreement the following programs of insurance covering its operations hereunder. Such insurance shall be provided by insurer(s) satisfactory to ACS's Risk Manager, and evidence of such programs satisfactory to ACS shall be delivered to ACS, on or before the effective date of this Agreement. Such evidence shall specifically identify this Agreement and shall contain express conditions that ACS is to be given written notice at least thirty (30) days in advance of any material change or termination of any program of insurance. Such insurance shall be primary to and not contributing with any other insurance maintained by ACS, and shall name ACS as additional insured on the Commercial General Liability Policy, Business Automobile liability, excess umbrella liability. Vendor shall include ACS as loss payees on the property and commercial crime insurance policies. All such insurance shall be issued by a company that is licensed to do business in the State where the work is being performed and has a rating equal to or exceeding **A-** from A.M. Best. The following coverage are the minimum amounts required:

i. **Commercial General Liability Insurance:** including Premises & Operations, Products/Completed Operations, Contractual, Broad Form Property Damage, and Personal Injury with a combined single limit of not less than One Million Dollars (\$1,000,000) per occurrence and One Million Dollars (\$1,000,000) general aggregate. This coverage will also include a waiver of subrogation clause in favor of ACS. If the above insurance is written on a Claims Made Form, such insurance shall be endorsed to provide an extended reporting period of not less than two years following the expiration or termination of this Agreement.

ii. **Business Automobile Liability Insurance:** endorsed for all owned, non-owned, borrowed, leased, and hired vehicles with a combined single limit of at least One Million Dollars (\$1,000,000) each accident. If Vendor's employees use personal vehicles in the performance of work under this subcontract, the State Financial Responsibility Law, must be complied with by the employee, and an "Employees as Insured" endorsement shall be required to Vendor's Business Auto Policy. This coverage will also include a waiver of subrogation clause in favor of ACS.

iii. **Worker's Compensation:** Vendor shall maintain a program of workers' compensation insurance in an amount and form to meet all applicable requirements of the State of Tennessee, including employer's liability with a Five Hundred Thousand Dollars (\$500,000) limit, covering all persons performing work on behalf of Vendor and all risks to such persons under this Agreement. Self-insurance is satisfactory as long as all the State or ACS filings have been done and approval has been obtained.

iv. **Property Insurance:** against all risks of physical loss or damage to property in Vendor's care, custody, or control and covering not less than the full replacement cost of any property at risk due to this Agreement.

v. **Professional Liability:** that will cover all acts, errors, or omissions by the Vendor in the amount of One Million Dollars (\$1,000,000) per claim with an annual aggregate of at least Two Million Dollars (\$2,000,000) inclusive of legal defense costs.

vi. **Excess Umbrella Liability Insurance:** in the amount of Five Million Dollars (\$5,000,000) per occurrence. ACS shall be included as additional insured.

vii. **Commercial Crime:** Vendor shall maintain a fidelity bond/commercial crime insurance policy, in the amount of not less than Five Million Dollars (\$5,000,000), to insure against loss of money, securities, or other property referred to hereunder which may result from employee dishonesty, forgery or alteration, theft, disappearance and destruction, computer fraud, and burglary and robbery. Such insurance shall be primary and name the ACS as loss payee as their interests may appear.

Failure to Procure Insurance: Failure on the part of Vendor to procure or maintain the required insurance shall constitute a material breach and default of this Agreement upon which ACS may terminate or suspend this Agreement. If coverage is canceled, terminates, or lapses and is not replaced with similar coverage, ACS has the right to go out and purchase insurance. The Vendor will be responsible for all costs and deductibles associated with the purchased insurance.

Claims Procedure: The Vendor agrees to notify the ACS immediately of any claim that may involve ACS. Notification should be sent to the ACS Project Director.

3.4 Authorized Service

Vendor must have qualified employees who are available to do the implementation service that is requested. Specifically provide:

- Verification (consultant name and certification number) that the install consultant for this project has passed the Microsoft exam 70-281 entitled *Planning, Deploying and Managing an Enterprise Project Management Solution* used by Microsoft to qualify Project Server expertise.
- Verification (consultant name and MBB details) that the business process consultant for this project is a Master Black Belt in Six Sigma.
- Verification (consultant name and certification numbers) that the Project consultant for this project has passed the Microsoft Office Specialist (MOS) exam in Microsoft Project.
- Verification (consultant name and date PMP achieved) that the engagement manager for this project is a certified Project Management Professional and in good standing with the Project Management Institute.
- Information about how many Project Server 2002 or 2003 implementations has your firm successfully deployed (do not include engagements where your firm was a prime).
- Information if Project Server 2003 is a core focus area for your firm. What percentage of your annual revenue is based on Project Server 2003 implementations?
- Details about your implementation scope, cost, resources and timeline using Microsoft Project Professional 2003; include snapshot with your response to this RFP.
- Information if your firm uses Microsoft Project Server 2003 and SharePoint to manage all of your projects and resources, including internal reporting and timekeeping. Please briefly describe the types of projects that you publish to this environment, or why you do not use the product internally.
- Information if your firm host our deployment project plan and SharePoint collaboration site to allow us to view status at any time and collaborate on project issues, risks and deliverables via your Project Server environment.
- Information about the types of training materials and services you will supply to our organization. What types of training would you recommend and offer our staff as part of this agreement?
- Information from a technical perspective in regards to the most complex implementation your organization participated in. How large was the user base?
- Information describing briefly the types of Project Server 2003 customizations that have been requested by former clients.

- Information describing briefly the approach your engagement team would use to understand our current and desired environment, and how the configuration of the tool would be determined.

4. General Information

This section covers topics describing the obligations and expectations of the City of Memphis and Vendors.

Advisory – Vendors are encouraged to review this RFP thoroughly, including all requirements, terms, conditions, deadlines, and cost information to ensure submission of a timely and responsive proposal. Vendors must fully document all costs and thoroughly explain the anticipated benefits to the City of Memphis.

4.1 Relevant Local and Corporate Experience

The City requires that each Vendor provide verifiable, documented evidence of local government and corporate experience, preferable in an environment comparable in size and scope to the City of Memphis, for all the services detailed in its proposal. It is the responsibility of the Vendor to explain how past experiences relate to the Vendor's proposal, including appropriate quantifiable data. Only verifiable experience with references will be considered.

4.2 Pricing

Vendors **must** submit cost proposals in the format shown in **EXHIBIT A through EXHIBIT B in the Response Format and Mandatory Requirements**. (It should be noted that the City's goal is to provide the best public service possible and that cost will be only one factor in the evaluation of proposals.)

4.3 Disclosure of Information

Once the final contract is awarded, the selected Vendor shall not disclose any details in connection with City of Memphis or ACS information without the advance written approval of the City's Contract Administrator. The Vendor may identify its services to clients provided that, during the performance period of the contract, the Vendor shall not publish or disseminate commercial advertisements, press releases or feature articles using the name of the City of Memphis without written consent of the Contract Administrator.

4.4 Proprietary Considerations and Public Records

Responses to this RFP become the exclusive property of the City of Memphis and are public record.

4.5 Non-Responsive Proposals

The City reserves the right to deem proposals non-responsive if any of the documents required by the City are omitted; dates/times related to the RFP are missed, or if the basic required components of the solution and related services are not addressed.

4.6 Proposal Closing Date

Written responses to this RFP must be received by ACS no later than 2:00 PM CENTRAL TIME on the Date listed in Section 1.1 as "Proposals Due (Mandatory)". Sealed responses must be addressed as it appears on the front page of this document titled "Proposal Accepted at".

4.7 Right to Reject

Notwithstanding any other provisions of this RFP, the City reserves the right to reject any or all proposals.

4.8 Inquires

All questions pertaining to the RFP must be forwarded to ACS at the e-mail address listed on the front page of this document under “**E-Mail Inquiries**” (“Appropriate Contact”) no later than 4:00 pm CENTRAL TIME on the date listed in Section 1.1 “Deadline for questions”. All questions received by the stated time will be answered in a timely manner. Failure to address questions to the Appropriate Contact may disqualify a proposal from consideration. Written responses to all properly presented questions will be provided at least 24 hours prior to proposal closure via the City website at <http://www.memphistn.gov/>. Responses will not be emailed, only posted to the website.

4.9 Prohibitions of Amendments

Once a proposal has been submitted, the City will not accept any amendments or enhancements to the proposal.

4.10 Proposal Cost

The City will provide no reimbursement of any kind for any costs incurred in responding to this RFP.

4.11 Copies

Vendors must submit **one (1) original and seven (7) copies** of the proposal (including one (1) on CD viewable using Microsoft Office Products or Adobe Acrobat software), supporting manuals, brochures and reports on or before, but no later than **2:00 pm CENTRAL TIME on the Date listed in Section 1.1 as “Proposals Due (Mandatory)”**. Proposals received after the closing time and date will be considered late and not entitled to participate in the process. Proposals, copies, and related information should be sealed in a single package with the address of the Vendor in the upper left-hand corner and clearly marked: **IMPLEMENTATION OF AN EPM SOLUTION**. Sealed responses must be addressed as it appears on the front page of this document titled “Proposal Accepted at.”

5. M/WBE (Minority/Women Business Enterprise) Program

The City has a Minority/Women Business Enterprise Program that is designed to increase the participation of minority and women-owned businesses in The City’s purchasing activities.

M/WBE Definition

Minority-owned businesses are defined as those that are 51% owned and controlled by African Americans. Women-owned businesses are defined as those that are 51% owned and controlled by one or more women, but not African Americans. To qualify as an M/WBE Vendor, a firm must be included on the list of certified M/WBE’s, available from:

**Office of Compliance
125 N. Main, Room 440
Memphis, TN 38103**

A list of certified M/WBE Vendors is available from the Office of Compliance, at the address listed above.

M/WBE Certification

Only those Contractors that have been certified by the Uniform Certification Agency are eligible to qualify as M/WBE businesses. If the Contractor is a certified firm, enter the following information:

Minority (MBE): _____ Women (WBE): _____

Certification Number: _____
COMPLY (Insert YES or NO): _____
EXCEPTION (Insert YES or NO & Specify): _____

Certified Subcontractor Participation

The City also encourages non-M/WBE Vendors to seek participation in this proposal with an M/WBE Vendor. Even if you are not an M/WBE Vendor, please explain below any participation by an M/WBE Vendor that is proposed for the project. Include name, address, and certification number if any M/WBE participant, plus the estimated percentage of the contract to be awarded to the participant, as follows:

\$ Show the dollar value of the subcontract to be awarded to this Vendor.

\$ Show the percentage of the total proposal represented by the subcontractor.

M/WBE Include whether the Vendor is MBE by inserting an M, or WBE by inserting a W.

Submission of this proposal commits the Vendor to the firms listed below:

| \$ | % | M/WBE | Certified Subcontractor's Name, Address, and Telephone | Certification # |
|----|---|-------|--|-----------------|
| | | | | |
| | | | | |
| | | | | |
| | | | | |

For additional information regarding certification as an M/WBE Vendor, please contact: Ms. Carlee McCullough at (901) 576-6545.

6. Response Format and Mandatory Documents

This section provides an outline of the format and structure of the response to the document. Failure to submit a response that conforms to the format outlined in the section will be considered non-responsive and, as such, will disqualify the Vendor. Vendors must submit **one (1) original and seven (7) copies** of the proposal (including one (1) on CD viewable using Microsoft Office Products or Adobe Acrobat software), supporting manuals, brochures and reports on or before, but no later than **2:00 p.m. CENTRAL TIME on the Date listed in Section 1.1 as "Proposals Due (Mandatory)."**

Proposals received after the closing time and date will be considered late and not entitled to participate in the process. Proposals, copies, and related information should be sealed in a single package with the address of the Vendor in the upper left-hand corner and clearly marked:

IMPLEMENTATION OF AN EPM SOLUTION. Sealed responses must be addressed as it appears on the front page of this document titled **"Proposal Accepted at".**

The following outline is required to used for Vendor responses

(Including headings, sections and paragraphs)

- A. Cover Letter and Corporate Introductions
- B. Table of Contents
- C. Description of Service compliant with this entire document
- D. Company Background
- E. References

- F. Response
- G. Cost
- H. Completeness
- I. Executive Summary

Vendors may further subdivide specific paragraphs or add relevant sections at the end of the proposals.

6.1 Response Preparation

In preparing a response to this RFP, the following should be considered:

1. Proposals should be written clearly, unambiguously, and to the extent possible in such a manner that evaluation committee members with little or no technical expertise will understand it.
2. Proposals should be specific and complete in every detail. However, Vendors are welcome to outline alternative or additional services, provided the associated costs and benefits to the City are clearly presented. While the City and ACS encourages Vendor creativity in response to the RFP, the evaluation of proposals will be based primarily on responses to the required elements.
3. Proposals may be deemed non-responsive if they are substantially an advertisement of past accomplishments and corporate history.
4. Proposals must conform to the outline below, including headings, sections, and paragraphs. Vendors may further subdivide specific paragraphs or add relevant sections at the end of their proposals. However, the proposal must be clearly organized so the evaluating committee is able to easily locate responses to specific items. If a Vendor cannot or chooses not to respond to any requirement, recognition of the requirement must be listed in sequence with "No Response" inserted and an explanation for the decision not to respond.
5. All specified information must be provided in accordance with the outline. Reference to other documents must only be used to supplement and/or substantiate information outlined in the body of the proposal.
6. All pages must be sequentially numbered.
7. All responses shall be firm offers and may not be withdrawn for a period of 120 calendar days following **the Date listed in Section 4 as "Proposal Due (Mandatory)"**.

6.2 Cover Letter and Corporate Introductions

This section shall comprise of no more than two pages, including name and address of the firm or joint venture submitting the proposal and the name, address and telephone number of the person(s) authorized to represent the firm or joint venture. If the proposal is being submitted by or on behalf of more than one entity, all entities represented must be clearly identified.

6.3 Table of Contents

The table of contents should provide a comprehensive listing of the material in the proposal arranged by section, with a listing of the subject(s) in each section, and with pages numbered. The numbering of the proposal must conform to that specified in this RFP Section 6.1 number 6.

6.4 Compliance with RFP Requirements

The Vendor must thoroughly discuss and explain in detail how their response to each requirement in the RFP will be met.

6.5 Company Background

Vendor must provide a brief company description, history, and financial status. In addition, Vendor should submit the following information:

- a) **Name.** The name under which the bidder is licensed to do business.

- b) **Address.** The address of the bidder's headquarters office.
- c) **Local Address.** The address of the bidder's local office responsible for the proposed work, if different from the headquarters office.
- d) **Local Officers.** Names, titles, and telephone numbers of local officers or representatives of the bidder.
- e) **Years of Local Service Experience.** The number of years the bidder has actively participated in this service.
- f) **Size of Staff.** The number of bidder's employees: internationally, nationally, and locally. The number of technical and support staff currently supporting similar service, their qualifications, and length of service.
- g) **Annual Report.** The bidder's most recent annual report or current audited financials. The financial stability of the Vendor and the Vendor's length of time in business will be closely evaluated.
- h) **Customer List.** Names, address, and telephone numbers of customers to whom the bidder provides the same/similar services as quoted in this document. References may be contacted to describe their experience with the bidder, including the quality of the bidder's technical support and maintenance.
- i) **Record with The City.** Description of past bidder experience in delivering products or services to The City similar to those required under the contract.
- j) **Current Contract Obligations.** Existing bidder contractual commitments of similar scope and priority, and their estimated impact on the bidder's ability to service this contract, if awarded.
- k) **Other.** Other general information, as determined by the bidder to be of importance in evaluating the bidder.

6.6 References

Vendor must provide references that are able to confirm the successful implementation and support of other clients of equal size. The references must include the name, address, and telephone number of top-level management contact person for each reference. ACS/City must be able to contact the reference without notification to the Vendor. A minimum of three (3) and a maximum of six (6) references must be provided. At least two (2) references should be for contracts of similar size or larger. It would be preferable if one (1) reference is an organization of an emergency or public service nature, with 24-hour operation preferred.

6.7 Response

The response should be specific and complete in every detail of service described in the Contract Scope as outlined in Section 2 and Vendor Qualifications as outlined in Section 3.

6.8 Cost Table

The cost to the City for the Vendor's services must be in the following format shown:

EXHIBIT A – EPM Implementation

EXHIBIT B – TCO (Total Cost of Ownership)

6.9 Additional Data

This section should include any additional information the Vendor believes to be essential to a thorough evaluation of its proposal. List all attached reports, financial documents, etc., and sequentially number all pages of the proposal and attachments. If no additional data is appended, Vendor should state: "There is no additional data to be presented."

6.10 Completeness

Although the City and ACS have made every reasonable effort, there is no representation made regarding the completeness of the contract requirements. The Vendor is expected to review the requirements and make appropriate recommendations. Any required services, products, or equipment not specified in the proposal will be the sole responsibility of the Vendor and should be listed in this section.

6.11 Executive Summary

Vendor shall describe in non-technical terms their approach to implementing the EPM system, identifying any unique or distinctive services to which the Vendor wishes the evaluation committee to give particular attention. Do not include any pricing in this section.

7. Evaluation Process

The evaluation process involves a thorough review of the proposals and selection of a Vendor. The selected Vendor will have performed well in all areas.

7.1 Evaluation Committee

All proposals will be reviewed by ACS to determine if they contain the minimum essential requirements outlined in the RFP, including instructions governing submission and format and compliance with standard City requirements. Those proposals deemed non-responsive may be disqualified without further evaluation and the Vendor will be immediately informed. An Evaluation Committee will examine each proposal that meets the mandatory requirements and recommend a Vendor to the City.

7.2 Evaluation Criteria

The primary object of this document and any subsequent contract is to obtain the lowest and best cost for the City, consistent with required standards for product and service quality. Vendor evaluations, and ACS' subsequent decision on awarding all or part of the contract, will include, but will not be limited to, the following criteria:

- a) **Location.** Whether or not the Vendor is headquartered, or maintains an active office, in Shelby County.
- b) **Experience.** Whether or not the Vendor has operated a business providing similar services for a minimum of five (5) years. Whether they meet the criteria specified in section 3.4.
- c) **Local Experience.** Whether or not the Vendor has a satisfactory record, verifiable through references, of service to local customers, comparable in nature and scope to services required under the contract.
- d) **Financial Stability.** Whether or not the Vendor seems capable, based on audited financial records, of providing service under this contract while maintaining its normal business operations and discharging its obligations.
- e) **Staffing.** Does the Vendor have full time staffing with experience with this type of work?
- f) **Expertise and Technical Capabilities.** Whether or not the Vendor is certified.
- g) **Current Contract Obligations.** Whether or not existing Vendor contractual commitments or similar scope and priority are likely to have a negative impact on the Vendor's ability to service this contract.
- h) **Cost and Terms.** Whether or not the Vendor's proposed cost and terms, in ACS' judgment, are consistent with current market pricing, appropriate for the goods and services required, and commensurate with the level of quality expected.
- i) **Other.** Any other information that The City deems relevant and material in evaluating the Vendor.

Proposals will be evaluated on the compliance with City requests. Innovative approaches to increase the efficiency and effectiveness of operations will also receive considerations, as will the credibility of the Vendor's commitment to the success of the contract and to its verifiable record of working harmoniously and cooperatively with its clients.

Note: Oral Presentations

After preliminary evaluations are completed, a short list of qualified Vendors may be invited to give an oral presentation. This presentation is optional at the discretion of the City. **However, no proposal may be altered or enhanced during an oral presentation.**

EXHIBIT A – Implementation Costs

The cost for the Vendor’s services must be in the following format shown or similar with all the information requested here:

| <i>Phase/Group Tasks</i> | Timeline | Time | Cost |
|---------------------------------|-----------------|-------------|-------------|
| Requirements | | | |
| Design | | | |
| Build and Test | | | |
| Deploy | | | |
| Training | | | |
| Support | | | |

EXHIBIT B – TCO Template

This is a sample of the TCO (Total Cost of Ownership):

| <u>(Project Name) Total Cost of Ownership</u> | | | | | | | |
|--|-------------------|-------------------|-------------------|-------------------|-------------------|------------------------|--------|
| | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Total | |
| Software License Fees | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | Notes: |
| | | | | | | | |
| | | | | | | | |
| Software Maintenance Fees | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | |
| | | | | | | | |
| | \$0 | \$0 | \$0 | \$0 | \$0 | | |
| Hardware & Peripheral Costs | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | |
| | | | | | | | |
| | \$0 | \$0 | \$0 | \$0 | \$0 | | |
| Hardware Maintenance | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | |
| | | | | | | | |
| | \$0 | \$0 | \$0 | \$0 | \$0 | | |
| Professional Service Fees | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | |
| | | | | | | | |
| | | | | | | | |
| Total Cost per Year | \$0 | \$0 | \$0 | \$0 | \$0 | Total 5yr. Cost | |
| | | | | | | \$0 | |